Sail Your Way To Certification
...and #JustTakeTheTest

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ALA Certification Committee Chair
Office Administrator
Sheppard Mullin Richter & Hampton LLP

“Under The Hood”
What makes ALA’S CLM certification an exceptional program and valuable certification?

*CLM is a service mark of the Association of Legal Administrators
CLM<sup>SM</sup> Certification Team and a Disciplined and Rigorous Process

- **ALA Headquarters** – Danielle Christian, ALA Associate Manager, Certification and Education

- **HumRRO** – Dr. Gavan O’Shea, Director of Private Sector Talent Management (Doctorate in Industrial and Organizational Psychology)

  HumRRO is an independent and impartial outside testing contractor that specializes in credentialing programs

- **ALA Certification Committee** – 9 members chosen for their firm experience and subject-matter expertise

When to seek a credential?

Anytime!
- Valuable educational and career development tool

Seasoned legal manager
- Demonstrate knowledge earned over the years
- Continue to identify your accomplishment in retirement as CLM(Ret.)

Transferring into the legal management profession
- Demonstrate your competence in a new occupation
Why seek a credential?

For the Professional:
• Demonstrates competency -- knowledge in all areas of legal management
• Increases professional credibility and value to your firm, a seat at the table
• Increases your marketability and ability to compete in the job market; differentiates you from others
• Personal satisfaction
• Preparing for exam enhances skill set & broadens knowledge base
• Recertification helps you stay current

For the Employer:
• Employers can efficiently identify qualified applicants
• Employers can promote that firm is run by certified professional
• Encourages and improves job performance

“You owe it to yourself. If you’re going to have a career, why not make it the best you can? The journey is incredible, the benefits you reap at a personal level are even more incredible.” -2013 survey of CLMs

What does it mean to be a Certified Legal Manager?

• CLM outwardly demonstrates your personal achievement and professional commitment to your career and the legal management profession

• Demonstrates that you have mastered the knowledge, skills, and abilities to operate at a high level of expertise in the field of legal management

• Shows the legal and “civilian” world that you have an elevated level of knowledge in areas identified as essential to be a legal manager
What Managing Partners Say

"Attorneys notice and appreciate the CLM’s expertise in managing the business of law at their firms.

"The CLM designation is an indication of professional excellence."

"Lawyers are status conscious, and the CLM provides professional status that they can relate to."

"This certification exam covers very important principles necessary to the effective and proficient administration of a law firm."

What does the Certification Committee do?

• Item research, writing, editing
• Review exam
• Set cut score
• Evaluate program
• Ambassadors
Rigorous Item Development

- Committee term is 4 years in order to train and develop good items
- Committee expertise covers all subjects in body of knowledge
- Handbook reference, first-year formal orientation, assigned mentor
- Item-writing training by professional testing contractor
- Thorough item review and revision (fall and winter meetings)
- Content validity review by CLMs
- Pilot testing and statistical analysis before accepted as a graded item
- Review of examinee comments

Item Writing

- Typically a 2-3 year cycle to develop items
- Professional training
- Items are designed to test:
  - knowledge-**application** (performance-based)
  - versus
  - knowledge-**recall** (memorization)
Item Review and Revision

- Committee reviews 200-300 items annually
- Perform additional research as needed
- Take the exam annually

Exam Review
- To ensure relevancy, not obsolete/outdated
- To make sure no item duplicates or cues an answer in another item,
- To set expectations for analysis process in setting the cut score

Content Validity Ratings

“CV” Ratings are Conducted by Non-Committee Members Who Are CLMs

Answer two questions:

➢ How Important is the Concept?
How important is the knowledge or skill required to answer this item for acceptable certification-level performance?

➢ What are Consequences for Lack of Knowledge?
Will the lack of knowledge or skill required to answer this item result in performance errors that might cause severe or minimal consequences?
Pilot Testing Items

- If the question passes the three levels of review and scrutiny (HumRRO, Committee, Content Validity), it will be put on the exam, but only as a pilot question.
- Pilot questions must perform well statistically before being included on an exam as a scored question.
- Items with poor statistics go back to the Certification Committee for review and are either revised or dropped from the database.
- If revised, the item is pilot tested again.
- Each exam has 25 pilot items.

Exam Content

Why are so many areas covered on the exam?

- It’s the nature of our (broad) job according to ALA’s Practice Analysis-KSA Study.
- Latest KSA Study (2012) identified 65 competencies in a legal administrator job.
- CLM exam content:
  - 38 suitable for testing
  - 14 unsuitable
  - 13 low importance ratings; therefore, excluded

www.alanet.org > Certification > Competencies of Legal Administrators
Test Blueprint

- Comprehensive exam – 100 graded questions
- 4 main areas of content
- 9 subject-matter areas
- 1 correct answer (only)
- 3 distinct distractors

<table>
<thead>
<tr>
<th>Table 1. Current Test Blueprint (Updated in 2013)</th>
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<tbody>
<tr>
<td>I. Financial Management</td>
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<tr>
<td>A. General Accounting (01)</td>
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<tr>
<td>B. Financial Information and Analysis (02)</td>
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<tr>
<td>II. Human Resources Management</td>
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<td>A. Employee Selection and Promotion (03)</td>
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<td>B. Performance Management and Compensation (04)</td>
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<td>C. Organizational Development (05)</td>
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<tr>
<td>III. Legal Industry/Business Management</td>
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<tr>
<td>A. Legal Industry (06)</td>
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<td>B. Business Management (07)</td>
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<tr>
<td>IV. Operations Management</td>
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<tr>
<td>A. Technology (08)</td>
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<tr>
<td>B. Operations (09)</td>
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Scoring the Exam

- Pass score set by expert judgment
  Modified “Angoff” Strategy

- Candidate Profile
  “Qualified”

- Certification Standard
  Visit a 30-50 attorney firm, review their practices & procedures, be conversant about and offer advice in all areas of Body of Knowledge without relying on others
What can Chapters do?

Chapters Can Help

- Develop & support a Study Group
- Purchase study guides at a discounted rate
- Offer Scholarships
  - Education
  - CLM Application Fee
  - Books
- Provide mentors
- Hold a competition
- Become an approved CLM Provider
- Provide Education that is CLM approved
Application Requirements

4 Steps to Becoming Certified

**Experience Requirements**
- Principal Administrators – 3 yrs full-time as a principal or branch office manager
- Functional Specialists - 3 yrs full-time in a supervisory position
- Full-time employment managing a legal organization within 24 mos of the date of application

**Education Requirements**
- All Applicants – 2 hours in each of 5 “soft skill” management categories
- Functional Specialists – An additional 15 hours in content areas outside their specialty
- All coursework must be completed within 24 mos of the date of application

**Pass the Exam**

**Application & Code of Profil Responsibility / Fee**
Recertification

Every 3 years – June 30 or Nov 30

Education Requirements

36 hours of coursework
--3 hours in each of 5 subject areas
   CM, FM, HR, LI, OM
--1 hour in business ethics
--1 hour in substance abuse

Application & Code of Profi Responsibility / Fee

Year 1 & 2 –
Annual maintenance fee – $59
due June 1
Year 3 –
Recertification fee – $189

What to Expect at the Pearson VUE Exam Center

Testing Center:
• Computer-based exam
• Cubicle environment with other examinees
• Cannot take anything into the exam
• Calculator on computer
• For notes, provided a piece of paper and pencil
• For sound, provided noise deafening headphones
• Can mark items to go back to answer
• Strikethrough feature to narrow answers

Security:
• May have an electric wand
• May have to empty pockets, raise pant legs to knees, and sleeves to elbows
• Locker available outside exam area to hold drink, ID, etc.
• Breaks allowed, but go through entire security process to get back in

➢ Bring photo ID & testing center confirmation
➢ Dress comfortably
➢ Deduct 20 minutes for entrance security & setup

Find a test center near you at www.pearsonvue.com/ala/
Exam Dates – Spring & Fall

<table>
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<tr>
<th>Exam Date</th>
<th>Application Deadline</th>
<th>Registration Begins</th>
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<tbody>
<tr>
<td>November 5, 2018</td>
<td>September 5, 2018</td>
<td>Open as of January 1, 2018</td>
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<tr>
<td>May 13, 2019</td>
<td>March 13, 2019</td>
<td>Open as of January 1, 2019</td>
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<tr>
<td>November 4, 2019</td>
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ALA’s CLM exam is offered online at Pearson VUE’s many testing sites throughout the U.S.

All approved CLM applicants will receive a unique URL and password to register at one of Pearson’s testing locations approximately one month prior to the exam. Space is limited at testing sites — your preferred test location is not guaranteed.

Pearson VUE is the world’s leading test center, with hundreds of fully-owned and operated Pearson Professional Centers. Pearson Professional Centers use a patent-winning design created specifically for high-stakes testing and offers a carefully controlled, consistent testing environment.

Studying For the Exam
Benefits of Joining a Study Group

- Improve your notes
- Share expertise
- Support system
- Cover more material
- Makes learning fun
- Motivation!

Developing an Effective Study Group

- Size – how many?
- Moderator
- Where?
- How long?
- When?
- Goals and objectives
- Be prepared
- Participation
Session 1 - Introduction/Planning/Study Techniques
Session 2 - Communications and Organizational Management
Session 3 - Office Operations: Office and Project Management
Session 4 - HR Management: Employee Selection and Promotion
Session 5 - HR Management: Employee Selection and Promotion (Cont.)
Session 6 - Office Operations: Office and Project Management (Cont.)
Session 7 - Legal Industry: Business Management
Session 8 - Financial Management: General Tax Regulations
Session 9 - HR Management: Compensation and Benefits
Session 10 - HR Management: Organization Development
Session 11 - Financial Management: Analysis (Continued)
Session 12 - Office Operations: Technology and Automation Management
Session 13 - Legal Industry: Business Management
Session 14 - Financial Management: Analysis
Session 15 - Financial Management: General Accounting
Session 16 - Financial Management: General Accounting (Continued)
Session 17 - Office Operations: Technology and Automation Management (Cont.)
Session 18 - HR Management: Performance Management
Session 19 - Legal Industry: Business Management
Session 20 - Wrap-Up/ Follow-Up

Minnesota Chapter sample CLM study group outline
Shared in Online Community
Others shared by Atlanta, Jacksonville, & New York Chapters

ALA Online Community - "CLM Exam Study Tools and Discussion"

• Share articles and other study materials
• Sample curriculum outlines from Chapter study groups are posted here
Do you know how to get to the Online Community?

#BIZLAW in a Flash

- Helps to strengthen your understanding of terminology in the four core functional areas
- Studying definitions can be helpful for self-assessment (not tested on definitions)
- The development of this tool was made possible through a grant from the Foundation of ALA to the Greater Phoenix Valley of the Sun Chapter
While not designed as CLM prep courses, these online courses may aid in your CLM study.

- FM 1  Law Firm Accounting
- FM 2  Financial Information and Analysis
- HR 1  Employee Selection & Promotion
- HR 2  Performance Management & Compensation

Also, by completing both courses in HR and/or FM, you will have access to the Legal Management Specialist Certificate program by passing an exam. This is an assessment showing you learned pre-defined learning objectives. This is not the Certified Legal Manager (CLM) certification demonstrating broader knowledge and skills in the legal management industry.

ALA Study Guide - It’s Here!!

ALA CLM Study Guide

Historically, certification standards recommend that the certifying body of an organization be separate from the education function.

Those standards have softened, so ALA decided to develop its own study guide.

- This is another self-assessment tool; it will not tell you what is on the test
Tips for Successful Test Taking

• Avoid test anxiety
• Be realistic with yourself about how much time you need to study and prepare for the exam
• Learn relaxation and visualization techniques
• Avoid negative self talk
• Avoid procrastination
• Use resources, develop practice tests

Test Taking Strategies

• Sleep
• Avoid stimulants
• Eat healthy and regularly
• Be comfortable, hydrate, breathe
• If a question stumps you, skip it and move on. Put a mark next to skipped questions to find easily later on. Sometimes other questions will give you clues to the ones you thought you didn’t know
Multiple Choice Tips

- Read all choices given and select the best
- If you are unsure of which choice is best, eliminate those that seem wrong, then select between the remaining choices
- Come up with the answer in your head before looking at the possible answers, this way the choices given on the test won’t throw you off
- Read all choices before choosing an answer
- Don’t keep changing your answer, usually your first choice is the right one, unless you misread the question
- Know your terms and definitions

Study Group Survey – Speakers

How do you source speakers for the study group? Are the speakers paid? If so, who is paying the speaker, the chapter or the study group members?

1. Primarily business partners or chapter members: unpaid
2. Co-workers, attorneys; unpaid
3. Community resources via professional associations (ACP, SHRM, ALA Chapter members, ALA BP’s, FSCJ Advisory Committee; unpaid
4. No speakers
5. Each member of the study group is asked to select a session to present. The remaining sessions are done by other chapter members, bp’s, or individuals in the legal community such as employment attorneys or member of board of professional responsibility; unpaid
6. Business partners because they have so many contacts
7. Some guest speakers on certain topics, including IT, commercial real estate broker, insurance broker, BP’s; unpaid
8. No outside speakers, group members take turns preparing presentations using the concept “you best learn material when you teach it to others”
Questions?

Specific Questions About CLM Program, Testing Center, Study Groups?

alanet.org/education/certification

Contact ALA Headquarters

• Danielle Christian
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Thank You!

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Your opinion matters!

Please take a moment now to complete the evaluation.

Thank You!